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ABSTRACT

National Institute of Education (NIE) staff members have developed a convening process characterized by collaborative meetings with experts to focus on specific problems of an educational organization. The process is intended to help combine research knowledge with practical experience in order to make informed decisions quickly. This document is an evaluation report on the convening process used in 1983-84 to help the State of Mississippi implement its educational reform legislation. An NIE staff member observed the meetings and conducted interviews with the participants. Whereas some sessions involved all the participants, most involved two working groups focusing on school accreditation and teacher certification issues. Results indicate that almost all participants in both groups agreed that the convening process was better than other alternatives such as the serial use of individual consultants or library research. The process was most useful for the school accreditation group, which adhered most closely to the initial convening process model. The conceptual knowledge gained by Mississippi participants during the convening process, and reflected in the consultants' reports, was incorporated into the implementation plans developed by both working groups. (Author/TE)

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An Evaluation of the Convening Process As It Was Used in 1983-1984 to Help the State of Mississippi Implement Its Education Reform Legislation

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An Evaluation of the Convening Process As It Was Used in 1983-1984 to Help the State of Mississippi Implement Its Education Reform Legislation

Executive Summary:

NIE staff developed a convening process to help educators use research knowledge and practical experiences to make informed decisions in a short period of time. This evaluation process is characterized by one or more face to face collaborative meetings, the use of experts, and a focus on specific problems of an educational organization.

This evaluation report on the convening process used in 1983-1984 to help the State of Mississippi implement its education reform and legislation was written by an NIE staff member who observed the meetings and conducted interviews of the participants after the meetings. While some sessions involved all the participants, most of the time the consultants and the Mississippi educators split into two working groups focusing on school accreditation and teacher certification issues.

Results indicate that the convening process appeared to be most useful and satisfying for the school accreditation group which adhered most closely to the initial convening process model, but that almost all participants in both groups agreed that the convening process was better than other alternatives such as the serial use of individual consultants or library research. The conceptual knowledge gained by Mississippi participants during the convening process, and reflected in the consultant reports, was incorporated into the implementation plans developed by both groups.

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I. What is the Convening Process?

As defined and developed by Dr. Norman Gold at NIE, the convening process is a formalized evaluation strategy designed to help educators make informed policy decisions in a short period of time--usually less than one year. Typically the educators faced with making the decision bring members of their staff and stakeholders together to obtain the collective advice of expert consultants who have research-based and practical experience in resolving problems or in taking advantage of opportunities in the designated areas. The process is also characterized by one or more face-to-face pre-planned collaborative meetings which result in written recommendations, the use of ongoing expert networks, and a focus on a specific client's problems.

NIE staff became involved in the development of this process in conjunction with their focus on increasing the usefulness of evaluation in educational decision-making. Dr. Gold (1983) noted some of the following advantages of the convening process for Mississippi.

- The convening process differs from the traditional evaluations which have been unresponsive to users requiring a quick turn-around. Traditional evaluations are based on the research tradition, where confidence is gained through extensive time-consuming checks for reliability and validity of findings.
- The convening process "capitalizes on a natural system of support, where administrators and other educators call on trusted colleagues for advice, thus formalizing collegial consultation as an assessment and problem solving tool."

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o The convening process involves people representative of the range of experience and insight available in schools and from the research community concerning the problem being addressed.

According to Dr. Gold's Convening Process Model, major tasks include:

1. Conceptualizing the process and how it will operate.
2. Collecting descriptive and analytic information
3. Identifying and acquiring relevant consultants
4. Holding the convening activities
5. Presenting the results to the users

This formal convening process was first used by Dr. Gold and associates from NIE in 1982 to help the D.C. Public Schools decide how to modify the student promotion features of their competency-based curriculum/student progress plans. While a parallel questionnaire based study identified similar issues and made similar recommendations, the convening process "proved to be of unquestionable value", and "the administration of DCPS has characterized the convening process as being highly responsive to user needs" (Saunders, 1982).

II. Why was the Convening Process Used to Help Mississippi With Its Education Reform Legislation?

In 1983, Mississippi State Department of Education officials requested funds from the U.S. Department of Education to help them plan the implementation of their new Comprehensive Education Reform Legislation. Simultaneously, but without knowing of the Mississippi request, Dr. Gold in the NIE Evaluation team contacted the Mississippi State Department of Education to learn more about their initiative and whether NIE could assist. Thus, in lieu of money, the Department of Education via Dr. Gold agreed to help Mississippi apply research and evaluation expertise to help plan the implementation of their new legislation by managing a convening activity which focused on the school accreditation and teacher certification policies--major aspects of the reform legislation.

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Mississippi SDE staff in charge of this effort welcomed this help from NIE and received funding from a local foundation to pay the expenses of the convenees. The convening process was particularly appropriate for use in this situation as Mississippi needed to make numerous policy decisions in a short period of time. In addition there was an emerging school and teacher effectiveness research base to inform states and school districts about these decisions, and other districts and states throughout the nation had been designing and testing solutions to address similar types of teacher certification and school accreditation issues.

III. What Was This Mississippi Convening Activity?

Critical aspects of the Mississippi convening activity will be described by discussing key participant roles and the sequence of events. The major direct participants were the convening process manager from NIE, the host organization staff in the Mississippi State Department of Education, Mississippi stakeholders--primarily educators on the task force and the commission dealing with the reform legislation, and the expert consultants from across the nation.

Participant Roles

Convening Process Manager

Dr. Norman Gold from the National Institute of Education has served in this manager role in both experiences with the convening process that he designed. For this Mississippi Convening Process, he shared his paper "Operating Procedures for A Convening Process to Aid in the Design and Development of the Mississippi School Accreditation and Teacher Certification for School Improvement" (1983) with many of the convening process participants before the first meeting. As the leader/manager of this process, Dr. Gold was active in shaping the pre-convening meeting activities, conducting the meetings and facilitating follow-up activities after the meeting, which included two additional convening sessions focusing on school accreditation issues and principal competencies, respectively.

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Although Dr. Gold had expertise in many of the content areas, he primarily played the role of process facilitator. Additionally, he played a major role in making the meeting possible by helping to identify funds and consultants prior to the meeting. As facilitator, he outlined the purposes of the meeting, listened to participant concerns, praised individual and group contributions, assigned some of the subgroup leaders, lightly guided the course of the meeting activities, and summarized some meeting discussions.

Host Organization Staff

Ralph Brewer, Director, Division of Instruction, State of Mississippi Department of Education; Jane Woodruff, Staff Consultant on Performance-Based Accreditation; and Brenda Hankins, Staff Consultant on Teacher Certification and Administrator Education and their staff members and colleagues were the primary host organization contacts.

The SDE staff performed many essential functions ranging from securing foundation support for the meeting to typing and copying meeting documents and taping sessions. They also helped develop the meeting agenda, opened the meeting, provided substantive information and prepared and circulated copies of the final meeting recommendations. Additional specific functions included arranging for the meeting facilities and press coverage, preparing extensive briefing documents, collecting information of value to the participants prior to and after the meeting and working with their respective Task Force on Performance-Based Accreditation (School Accreditation) and the Commission on Teacher and Administrator Education, Certification and Development (Teacher Certification) on an ongoing basis. They were the major linkers responsible for helping the Mississippi stakeholders learn from the convening process and also had major responsibility for incorporating knowledge gained into the Task Force and Commission reports which were to result in plans for the implementation of provisions in the Mississippi educational reform legislation.

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Stakeholders or their Representatives

Aside from the Mississippi Department of Education officials, stakeholders at the convening process meeting were five selected members of the Task Force on School Accreditation and five from the Commission on Teacher Certification. They provided meeting participants with up-to-date information on activities and reports of their respective groups and participated actively in the discussions leading to the development of recommendations. Not all of these stakeholders, who included citizen representatives, school board members, superintendents and college deans, were able to attend the sessions on both days of the meeting. (See Appendix A for a list of Mississippi participants in each group.)

Consultants

Dr. Gold and Mississippi Department of Education officials selected consultants who were nationally prominent experts with research and/or practical experience in teacher education and school effectiveness. They were divided into two groups: 1) teacher certification, dealing with the teacher education aspects of the Mississippi education reform legislation; and 2) school accreditation, focusing on school improvement aspects of the legislation. Prior to their arrival in Mississippi they read a great deal about the convening process, the Mississippi education reform legislation, and related papers, including the most recent stakeholder planning documents. During the meeting, in addition to total group sessions, the consultants met with the respective Teacher Certification and School Accreditation stakeholder groups and Mississippi SDE staff. (See Appendix B for list of consultants.)

Other Participant Observers (Funder, Union Representatives, Evaluator, Press).

These observers selected which sessions and groups to monitor. They included: Dr. Tom Wacaster, an experienced Mississippi educational researcher in his own right and the Director of the Hardin Foundation which paid for the meeting; two representatives from the Mississippi Education Association; Mississippi Education Television staff who did a

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news report on the meeting; and Dr. Susan Klein, a Senior Researcher from the National Institute of Education who conducted a process evaluation.

Sequence of Events

Pre meeting activities (September to November 28, 1983) included:

1. Identifying the specific issues to be addressed such as teacher certification and school accreditation, from among the many state responsibilities covered in the new legislation.
2. Developing criteria to aid in the selection of appropriate expert consultants for a school accreditation group and for a teacher certification group;
3. Defining tentative substantive objectives for the groups.
4. Identifying funding support to pay for the convening meeting. (The Hardin Foundation in Mississippi paid most of the meeting expenses.)
5. Selecting the consultants and arranging for them to attend the convening process meeting.
6. Preparing background materials for the consultants from across the nation and for the Mississippi based meeting participants and making sure that all were appropriately briefed on the purpose of the meeting and the convening process. (The consultants read all the materials they received before the meeting and developed questions to ask at the meeting along with tentative recommendations.)
7. Conducting a telephone conference call with Dr. Gold, the consultants, and Mississippi State Department of Education staff on November 16, 1983.
8. Arranging for the meeting facilities and agenda.
9. Identifying information and resources, in addition to what was supplied by the consultants, to share with the Mississippi staff.

These pre meeting activities were joint efforts of Dr. Gold and the Mississippi Department of Education staff in charge of this project, primarily, Drs. Ralph Brewer, Brenda Hankins and Jane Woodruff.

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On-site Jackson, Mississippi convening process meeting activities of November 29-30, 1983 included:

1. An introductions session on the first evening to review the agenda, meeting goals and procedures, and to meet participants. This included an informal social hour. The agenda, which was not followed precisely, is included in Appendix C.
2. A total group orientation session the first morning designed to have the Mississippi participants share their understanding of their needs with the consultants from across the nation.
3. Separate meetings of the two groups (teacher certification and school accreditation), each composed of the consultants and Mississippi participants, to arrive at a consensus on issues and answers.

   The school accreditation group, composed of four consultants and a changing number of stakeholders and host staff, met together on the first day. Late in the afternoon, in the evening, and early the next morning, the consultants met separately without the stakeholders to prepare their consensus based recommendations to share with their larger group. When this consultant group met with the stakeholders, it was chaired by the Mississippi Task force chair Dr. Olon Ray and when it met alone it was chaired by Dr. William Gauthier.

   The teacher certification group met as a whole group with both consultants and stakeholders the entire time. Two of the five consultants, however, arrived late--one, on the afternoon of the first day, and one on the second day. The meetings of this group were always chaired by the head of the Mississippi Teacher Certification Commission, Dr. Lisso Simmons. Two consultants who arrived late also stayed longer than the others and wrote the final group report.

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4. A final joint summary session to share the recommendations from each group and to identify joint concerns and opportunities.
5. An evaluation of this process conducted by Dr. Susan Klein from NIE.

Follow-up activities (November 30, 1983 - November 30, 1984) included:

1. NIE staff participants, Drs. Gold and Klein and the Mississippi SDE staff met for debriefing and planning follow-up activities.
2. Host staff polished and typed the reports from the two groups and sent them to participants for comment and revisions and then to the entire school accreditation task force and teacher certification commission for action.
3. Consultants and observers sent Mississippi SDE hosts information they thought would be valuable, based on meeting and subsequent discussions.
4. Mississippi task forces continued to meet with Mississippi SDE staff. The SDE staff also called on some of the consultants to review key documents and reports prepared by the task force and commission.
5. Some of the old and a few new consultants involved with the school accreditation task force issues reconvened after the American Educational Research Association Annual meeting on April 27, 1984 in New Orleans, Louisiana to discuss the preliminary task force report and provide additional guidance. Key Mississippi representatives and NIE staff also attended. This could be considered a mini replication of the convening process.
6. A second mini-replication of the convening process was conducted by a subcommittee of the Commission in Jackson, Mississippi, in May 1984 when some of its members and a SDE staff representative met with two consultants recommended by Dr. Gold. Neither of these consultants was involved in the November 1983 convening process.

7. Dr. Klein prepared a written evaluation of this convening process in December 1984 and January 1985.

IV. What Did the Consultant Participants Think About This Convening Process?

Both during and after the convening meeting, Dr. Klein asked the participants about their reactions to identify strengths and weaknesses of the process to guide NIE in developing a model for conducting convening activities. All consultants responded to Dr. Klein's 30 minute telephone interview in January 1984, about two months after the convening meeting at the end of November, 1983. (See Appendix D for Interview Questions.)

The activities of the consultants in the school accreditation group followed the model as described by Dr. Gold (1983) better than the consultants in the teacher certification group. In doing so they used the stakeholders mostly as resource people, to learn about the needs and realities of Mississippi and then wrote an independent report. The teacher certification consultants primarily met with their whole group the entire time except for the last night when the two remaining consultants wrote the group report.

Reactions of Consultants in the School Accreditation Group

The consultants in the school accreditation group reported that the most difficult part of their task was processing and assimilating the tremendous amount of information that they were given about Mississippi prior to and after arrival at the meeting. They also found that it was difficult to distinguish the diverse roles and political context of the Mississippi participants. It was also difficult to write recommendations that were more than self-evident in such a short time.

These consultants had many suggestions for improving various aspects of the convening process procedures. They were generally pleased with their interactions with the other consultants in their group, pleased with their mix of expertise, task orientation and the fact that they all arrived on time and stayed to the end. They felt that the pre meeting telephone conference with Dr. Gold and Mississippi SDE staff and other consultants did not help much and that it would have

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been more effective to bring the consultants together prior to meeting without all the Mississippi stakeholders for a briefing on their roles and the political context of the various Mississippi participants.

The consultants felt that it was important to receive up-to-date information on what the Mississippi Task force had been doing and thinking. For example, the task force had generated new plans which had not been included in the briefing materials sent to the consultants a couple of weeks earlier. The consultants also felt that the Mississippi task force members should have had a better idea of what the convening process was designed to do and one consultant suggested that the task force should have clarified what they wanted from the consultants and even identified questions to ask the consultants-- although it is likely that the consultants may not have agreed that these were the best questions to guide the convening process discussions. The consultants also mentioned that it may have been better to meet with a smaller group of Mississippi Task force members and to have had more frequent opportunities to check their thinking with these task force members.

The consultants felt that Dr. Gold performed a difficult leadership role in a generally exemplary way, although they did not always agree with some of his specific actions. They felt that it may have been better for him to remain with one group; sometimes when he joined a group and offered some substantive comments, he did not facilitate the groups' progress due to his lack of knowledge of the previous discussion. Another consultant felt that he could have been clearer on the context and procedures. One person also mentioned that it may have been better for the group to pick its own leader than to have Dr. Gold select a leader.

In response to a question about whether this convening process had advantages over the use of individual consultants or other options, all four consultants said yes, that the collaborative approach, cross fertilization of ideas and experiences, and the chance to challenge each others' ideas, enriched the final recommendations. Suggestions on

improving the process included planning to engage these consultant groups over a longer period of time to provide for continuity, and extending the length of the meeting by a day. Some felt that it might have been better not to have the two groups of consultants meeting simultaneously. One consultant pointed out that if Mississippi had been clear on their specific needs for expertise, they could have hired individual consultants serially, but that this was not the case at this point in their planning efforts. They felt that the intensity of the needs and the required written group recommendations were important features to retain.

The consultants were also asked what was of most value to them personally about being involved in the convening process. All consultants felt that it was a worthwhile professional experience to meet with other experts in their area, test their own ideas and apply them to a new situation, and learn from their colleagues. They felt that it was equally valuable to meet with Mississippi educators and learn about their new opportunities.

Finally, the consultants were asked how they felt that they helped Mississippi. They said that they were able to bring a bit more objectivity and a conceptual framework to the task force deliberations, raise relevant points of information, and provide cautions about approaches. They were also able to confirm some of the things that the Mississippi participants were thinking, such as the importance of getting individual school staff members involved in decision making. They also redirected task force members' attention to a positive approach to achieve school effectiveness rather than a preoccupation with what to do with those who don't meet minimum standards. The latter resulted in the combined use of an improvement and accreditation process.

Reactions of Consultants in the Teacher Certification Group

The six consultants in the teacher certification group agreed with the school accreditation group that it was difficult to understand the political context of the various groups from Mississippi and that it would have helped if roles of the various participants were structured

more clearly. Others felt that it was difficult to arrive at a level of information exchange that was meaningful to all the participants. They often felt that the discussion was too general and theoretical and that they didn't use their time well.

They offered a variety of suggestions for improving interaction among the consultants. First, they wanted the consultants to convene at the same time rather than to have some arrive a day late and others leave early. Some, but not all, felt that it would have been better for them to meet as a separate small group without the Mississippi Teacher Commission Members for some of the time--following the model of the consultants in the school accreditation group. One also felt that the consultants should have provided more research-based information on solutions to Mississippi needs. Another felt it would have been better to go from group to group to merge perspectives from each on common issues and one questioned the value of breaking the larger group into the two subgroups. Another felt that the consultants paid more attention to impressing each other than in trying to meet the needs of the Mississippi educators. Some also noted that their final recommendations were not truly representative of the group experience because it was written by two consultants who weren't at all the meetings.

Some of the consultants felt that their interaction with the Mississippi stakeholders would have been more productive if the consultants had assumed more of a leadership role in the group. However, they did appreciate Mississippi stakeholders efforts to try to define the issues and ask key questions, although they realized that there was no consensus among the Mississippi stakeholders on these items or on their expectations for this process. One suggestion for improving the process was for all the Mississippi stakeholders to have met before the consultants arrived to decide what they wanted from them. As it was, the leaders of the stakeholder groups seemed to know more about the convening process than the other members of their groups who attended. Also, it might have been beneficial for the consultants to try to learn more about the directions that the Mississippi participants were leaning and then help them move forward.

The teacher certification group consultants agreed with their colleagues in the school accreditation group about Dr. Gold's leadership activities. One said that Dr. Gold's "sense of the mission and eagerness to accomplish good things to help Mississippi shone through." Like the members of the other group, they felt that Dr. Gold was sometimes too permissive and at other times too prescriptive.

The consultants in the teacher certification group were definitely not as positive as their colleagues in the school accreditation group about the value of the convening process over other alternatives including individual serial use of consultants. Some even said that they felt that the school accreditation group was more productive and able to reach consensus. Most noted that it is important to obtain a broad perspective by drawing on experts with relevant, but different experiences, particularly when the change sought is so major. Others felt that their group was too large and one suggested that there should have been fewer consultants and more Mississippi stakeholders. Another felt that it was difficult for the stakeholders to cope with the diversity of the consultants' approaches and that it may have been better if the group had concentrated on how to adapt the Florida model to Mississippi. One suggested that the process may have been improved by forming subgroups and asking each to write sections of the final recommendations. One complained that the work days and nights were too long and that instead the process should have been extended an extra day.

In response to the question about what was of most value to them personally, several of the consultants stated that they gained new insights about education reform, found that interaction with their consultant colleagues helped them rethink their own positions, and that their interaction with the Mississippi participants helped keep them honest about the real difficulties of schooling. One consultant felt that not much was of value to him and that he would have rather been home working on the details of his projects.

Most of the consultants felt that they helped Mississippi stakeholders in the long term by encouraging them to slow down and to obtain a better understanding of the complexity of teacher certification

issues instead of just identifying evaluation tools before they knew what they valued. They also felt that the materials and models such as the Florida Teacher Certification Model that they shared would be beneficial to Mississippi.

V. What did the Mississippi State Department of Education Staff and Other Mississippi Stakeholders Think About the Convening Process?

State Department of Education Staff

Four of the Mississippi SDE staff who had prime responsibility for this convening process and for following-up on the new Mississippi reform initiatives participated in the telephone interview in late November and early December 1984 --- over one year after the initial Nov. 1983 meeting. One of these initial convening process participants went on to another assignment in the State Department and one who took over some of her responsibilities had only limited involvement in the first meeting. Another one of these participants missed all but the first night of the Nov. 1983 meeting due to a death in her family.

Despite their somewhat different types of involvement, all agreed that the convening process was quite helpful to Mississippi. They felt that it afforded the Mississippi participants a fine opportunity to hear from nationally noted professionals and to "pick their brains".

They also had the following suggestions to improve the convening process procedures: Have the SDE staff obtain more advance information about the consultants so that Mississippi participants would be better able to use the consultants' expertise. Have the Mississippi participants get together separately from the consultants some of the time. Possibly have fewer Mississippi representatives and ensure that those that did come were able to stay for the entire 2½ day meeting. They also suggested that increased clarity of roles and task orientation during the meeting would have helped. For example, they wanted Dr. Gold to help the groups be more decision oriented, for Mississippi participants to state their problems more clearly, and for the consultants to give a more direct response to these problems. One interviewee also mentioned that all the participants needed to establish

common language and understandings earlier in the process and that the best communication was at the second meeting in April 1984 after these understandings had developed. Since two groups were meeting simultaneously, one staff member suggested that a co-leader would have been helpful as it was difficult for Dr. Gold to cover both groups adequately.

All generally agreed that the convening process had advantages over serial use of individual consultants because it was beneficial to hear disagreements among the experts and to hear them react to each other and for a wide range of views and knowledge to be represented so that the larger picture could emerge. Some staff members also pointed out that serial use of consultants may have worked out better at the early stages of the reform effort since Mississippi participants were learning as they went along and didn't take as full advantage of the consultants in the November 1983 meeting as they did in the subsequent meetings. A major test of procedure is voluntary replication and the SDE staff facilitated the replication of the convening process for members of each work group. They also agreed that they may use the convening process again in other stages of the education reform effort.

In response to the question, "What was the most value to them personally?", the SDE members said that the meeting helped them become more familiar with what was known in their particular areas of concern and thus they were saved many hours of research. They also felt that the consultants gave them an ability to understand the total picture from a national perspective as well as to learn about different perspectives on the proposed changes. One said that this convening process was an essential part of performing the reform work.

Other Mississippi Stakeholders

School Accreditation Task Force Members

The four members of this task force who attended the November 1983 convening meeting felt that the most valuable aspects were the

opportunity to exchange ideas with experts, incorporate these ideas in a new conceptual framework, and receive reinforcement on many of their previous plans. They also felt that the critical mass of experts and multiple perspectives they represented helped all meeting participants develop a broad understanding and perspective on the issues and that this group process was more time efficient than using consultants individually. They liked the process so well that they supported its use again in April 1984 and would also like to see it used again in the next stages of the reform process.

Suggestions for improving the convening process included:

- involving the task force members in the planning and control of the convening meeting, rather than having so much of that responsibility reside with SDE staff;
- reminding some of the consultants, and others, not to talk just to impress others or act patronizingly toward the Mississippi stakeholders; and
- having the leader be sure to work with all the responsible groups (such as their Task Force), not just one government office (NIE) to another government office (SDE). If the task force members had been involved earlier, they may have decided that the entire group, rather than 5 representatives should have attended the convening process meeting.

Teacher Certification Commission Members

Compared to the School Accreditation Task Force participants, the three Commission members who responded to the telephone interview had similar but slightly less positive reactions to the convening process. They agreed on the value of hearing from experts about the most recent research based information and of having these experts confirm the value of some of their previous plans for educational reform, but felt that interaction with individual consultants rather than the large group may have been better some of the time. They did feel that the meeting was

a good learning experience for the commission members and that the consultants' diverse views did broaden their perspectives. Some also felt that the process should be used again, although none had much knowledge about how one of their Commission's subgroups (focusing on administrator certification) did, in fact, use a mini version of the convening process to learn about administrator competencies.

The Teacher Certification Commission members also had some suggestions for improving the convening process procedures that differed from the School Accreditation Task Force recommendations.

- They felt some of the consultants tried to push their personal philosophies too much and that the airing of personal views and disagreements among the consultants was not the most productive use of time. Although it was beneficial for Commission members to learn about alternative views, at times some would have preferred fewer consultants or more opportunities for small group or individual discussions with the consultants. They also found it frustrating to have some of the consultants arrive and depart on different days.
- They commented that all participants should have had clearer instructions to stick to the initial convening process model. For example, this would have meant that the consultants would have met separately to prepare initial recommendations which would have been then shared at the meeting for reaction by the Mississippi Teacher Certification Committee representatives.
- They felt that Dr. Gold as the leader should have been more directive about keeping the discussion focused on identifying research based issues and solutions, and examining what Mississippi had done and what the Commission members were considering doing.

Phil Hardin Foundation Observer

Dr. Tom Wacaster, the Executive Director of the Phil Hardin Foundation that paid for the consultants and other meeting expenses,

attended the entire 2 1/2 day meeting and was a participant observer in both the School Accreditation and Teacher Certification groups. The Foundation is charged with improving education in the state of Mississippi and has been active in informing the public about the Mississippi Reform Legislation and in supporting retreats for the new state school board and superintendent concerning this legislation.

He felt that this convening process was very worthwhile as it brought useful ideas into the state, caused Mississippi participants to sharpen their own ideas and to think more carefully about what they had previously considered, saved Mississippi educators time, and gave them a sense of self confidence. In fact, he felt that it helped the School Accreditation Task Force members realize that they were on the cutting edge nationally in their reform efforts. Dr. Wacaster agreed with many others that it is often useful to involve consultants individually, but noted the unique advantages of the consensus group process in imparting a great deal of information about alternatives to participants in a short time. He also felt that it may be valuable for Mississippi to use the convening process again at the pre- or post-test ends of the field testing stage of the reform program.

His suggestions for improving the convening process procedures included:

- Improving the briefing of the consultants on the realities and needs faced by the Mississippi educators. In addition to appropriate written materials, an early face-to-face briefing of the consultants upon their arrival by a few well chosen Mississippi educators would have saved hours of large group frustration.
- Realizing that timing is important. In this case, the School Accreditation Task Force was more advanced in their plans than the Teacher Certification Commission, and thus, they were prepared to use the consultants and the convening process more effectively.

- Ensuring that the convening process establish a clearer assignment of leadership roles. In this case it wasn't clear to what extent NIE, the State Department of Education or the Task Force or Commission leaders were "in charge". It would have been better to decide leadership roles at the start and if some of the within group leaders appear to be weak, provisions should be made for another leader to step in.

VI. How Did the Convening Process Discussions and Recommendations Influence the Mississippi Education Reform Plans?

School Accreditation Group

The consultants for the School Accreditation Group prepared a 15 page report of recommendations. The various sections on student evaluation, assessment, conceptual framework and implementation were drafted by individual consultants and then revised according to suggestions from the other consultants in the group. The following section will describe how some of the salient interrelated recommendations were or were not reflected in the April 30, 1984 "Report of the Performance-Based School Assessment Task Force".

1. Use a positive, improvement oriented approach to accreditation.

The consultants recommended "that the accreditation process be shifted from a deficit model penalty plan to a positive reward system." In this system the schools would set their own levels of excellence for which to aspire. This suggestion was accepted by the task force and in the introduction to their April report they stated:

> The task force wishes to emphasize the primary purpose of the performance-based accreditation system is to encourage the improvement of our public schools. Even though there has been a wave of reports enumerating the failures of public education, the task force is convinced that the majority of our public schools are doing an excellent job for our children. However, there is always room for improvement, since the most valuable natural resource our state has is its children. The Task force proposes no witch hunt to embarrass schools, but it does wish to provide a system which assures that the public is receiving a reasonable program for the tax dollars spent on public education. Furthermore, the system is designed to stimulate a long-range plan of growth which can eventually lead to Mississippi moving from the bottom to the list on which public schools are ranked on a national basis.

More details on how the school should select the level of performance they are seeking to achieve in each of the six major areas of the conceptual framework are described on page 51 of the report.

2. Reaffirmation of the legislated emphasis on using research supported school effectiveness strategies.

The consultants reaffirmed Mississippi's attempt to link school and teacher effectiveness research to school accreditation and to link district level and school level policies. References to these considerations were consistent throughout the Task Force report.

3. Revise the conceptual framework and develop explicit improvement oriented standards at the district and school levels.

The task force did change their conceptual categories to conform to the suggestions of the consultants. The pre convening process focus of Mississippi assessment plans consisted of the 5 broad categories of school leadership, school discipline, teacher behaviors, instructional program and staff development. The final conceptual model included the categories of achievement, instruction, climate, organization, and staff development. The consultants felt that the new categories based in part on models developed in Connecticut and California were less overlapping and more comprehensive and improvement oriented. As the consultants recommended, the task force also developed standards for each component of the new model and did not limit achievement standards to tests of academic achievement. As appropriate, some attention was also paid to articulating unique standards for the district and school levels.

4. Develop standards and procedures that would help the accreditation process facilitate educational equity for all special groups of students including, minorities, the poor, females, etc.

Specific consultant recommendations included reporting data by sex, race, age, and social-economic status. The consultants pointed out that such differentiation is an important aspect of the definition of effective schools "where achievement distribution curves for minority or poor children are similar to those in schools with middle class, white

enrollments". Various requirements to provide information according to demographic categories and to set minimum performance levels which consider background variables of the district are included in the Task Force report. The Task Force members also accepted the consultants' recommendation to accredit by school district, rather than by school to help insure an equitable distribution of resources and effort across the district.

5. Share information on the criteria and schools' performance publically.

The consultants recommended that "Extensive opportunities for public scrutiny and input should be provided". The task force report indicates requirements for the school district to make an annual public progress report available to the media in their area.

6. Train educators and others in the use of the educational data.

The consultants recommended that the State Department of Education should develop a group of highly skilled testing staff members, if they didn't already have such a group, and that "A major statewide training effort will be required if the level of data use by educational personnel is to be commensurate with the likely cost of the planned testing effort. In addition, the general public and policy makers at each level from local to state must be properly informed both to promote use and to prevent misuse of findings". The task force recommended the establishment of a research and development unit and funding for a testing program and personnel. It did not mention activities to facilitate data use by educators and the public (p.57).

7. Use computers to coordinate data acquisition and analysis and to facilitate comparisons and statewide planning.

The consultant report had numerous suggestions relating to the use of computers in the school accreditation process ranging from the use of test item banks to computerized grade reporting by district. In the Task Force report there was only a little mention of using computers to

make various parts of the accreditation plans feasible. That mention was limited to recommending that the proposed research and development unit analyze and interpret data with the use of computer aided statistical programs (p.57).

Teacher Certification Group

The two consultants who missed the first day of the convening meeting stayed to write a 17 page double spaced report. This report captured many of the ideas for the group which included consultants and Mississippi Teacher Certification Commission members. This report and a few additional recommendations from the meeting were summarized in a 6 page single spaced outline by Dr. Brenda Hankins in the State Department of Education. This "Summary of the NIE Certification Report" was distributed to the whole Teacher Certification Commission. Ideas from these documents were incorporated into the August 1, 1984 Commission on Teacher and Administrator Education, Certification, and Development working draft report which was discussed at public hearings in the fall of 1984.

The following will discuss how the convening group recommendations are related to what appears in this August 1984 working draft report and other ways the Mississippi stakeholders seemed to use knowledge from this experience. By the end of the 2½ day group meeting, the consultants and the Mississippi stakeholders present recommended that the full teacher certification commission:

1. Design certification standards to aim toward excellence rather than to insure minimum competency and that they use multiple procedures and instruments to evaluate progress toward excellence.

This suggestion is made explicit in the introduction (p.4) to this report which describes the Commission's conceptualization of its task by stating that "Defining and acting upon a set of indicators of excellence suggest a certification and subsequent staff development effort in which evaluation, rather than inspection, is the hallmark".

One of the Commission members also mentioned that the convening meeting helped convince the Commission representatives that the teacher certification test that they had been considering was too limited. Thus, in the draft report the Commission recommended that an applicant for provisional certification must pass subject matter knowledge tests and also demonstrate teaching competencies.

2. Increase focus on goals prior to the selection or development of instruments to determine certification.

The draft Commission report indicated the Commission's desire to focus on standards and criteria for process and product evaluation of teacher education programs in contrast to more of an initial focus on finding an instrument to assess teachers who graduated from these programs.

3. Will the emphasis of the reform activities be on patching up the current system or on attaining long range goals?

Although the draft report didn't address this question directly, there appears to be a substantial emphasis on long range goals such as long range plans to evaluate the graduates or "products" of teacher education institutions. The twenty year cycle of 5 year professional development plans for teachers also demonstrates a long term perspective.

4. Don't assume that the research-based teacher competencies can be adopted without question to fit Mississippi's goals that, in turn, should be based on its own definition of a good Mississippi teacher.

The report incorporated this philosophy by stating that the commission "developed and selected research-based teacher and administrator competencies that fit the model of what a "good" teacher is in Mississippi." (p.4) Instead of adopting either the Florida or Georgia Teacher Certification Models, they used some aspects of each. The report called for each college teacher education program to assess their students and that each applicant for certification should

demonstrate mastery of sixteen generic teaching competencies. Page 6 of the report further stated that, "Such a certification system would eliminate the traditional credit hours/course title approach utilized today." It is likely that this competency assessment requirement is also inherent in standard 9 for reviews of teacher education institutions. (See P. 9.)

5. Realize that there are four interrelated collaborative strategies in the production of good teachers--preparation in institutions of higher education, induction or apprenticeship experiences, maintenance or on the job support and assistance, and professional development.

The Commission did focus its approach on the following similarly defined areas:

- Teacher education

  The report outlined process and product standards to determine when teacher education programs merit certification. Standard 8 requires completion of a 12 week full day student teaching experience.

- Provisional year

  The report gives responsibility to the school districts for assessing teacher and administrator competencies, but said that the SDE would assist the district.

- Certification-recertification

  Page 6 of the report states:

  > As all accredited school districts are mandated to have staff development programs for their certified personnel, the Commission believes that strong staff development programs focused on that particular school district's needs will suffice as criteria for recertification. This is a dynamic approach to the system of renewal of certificates that should add quality and fresh skills to the expertise of Mississippi's teachers. It totally eliminates the taking of six semester hours of "anything" for the sake of acquiring six hours for renewal.
  >
  > These plans also--"require that educators be provided opportunities that will improve their professional skills.

> The opportunities needed will be determined by an on-the-job performance assessment of the educator. This changes the concept of recertification for teachers who continue to teach". (page 24)

- Professional development

The report also explains criteria for 5 year professional development programs for individual advancement. Successful completion of an approved 5 year program would entitle the educator to an increase in salary.

6. Realize that the teacher education institutions and others that have had an active involvement in teacher certification will be most resistant to suggested changes which decrease their autonomy in favor of state uniformity. Therefore, involve them actively in the design and implementation of the new process and allow some opportunity for local initiatives and autonomy.

The process and product evaluation of teacher training institutions and their graduates allows much institutional autonomy while attaining some statewide uniformity through adherence to explicit standards.

7. What are good administrators and how should the state certify them?

This was the subject of the Commission's small scale replication of the convening process when its administrator subcommittee met with two consultants with diverse views on assessing principal competencies. The principal competencies that were derived from that second meeting are included in the draft Commission report and the certification procedures parallel those for teachers that were developed in part from insights form the first convening process meeting.

8. Remember that all education decision makers should be accountable for student improvement, not just the teacher.

It appears that this was a continual concern of the commission members. One instance of its incorporation into the overall plan is evident in the distinction the report makes between staff development

and professional development. "Staff development programs are designed and administered by local school districts for the purpose of meeting specific institutional needs. The purpose of professional development is to enhance areas of professional competency selected by the individual educator." (page 26)

9. Remember that the implementation of these educator certification activities should be coordinated among all governmental levels and support common Mississippi goals.

The report describes different complementary roles for the local school districts, the State Department of Education and the Teacher Certification Commission.

VII. What Did We Learn From This Convening Process to Guide Its Use In the Future?

Overall Assessment

In general, the convening process participants were satisfied with the process and said that they would have used it again in similar circumstances. The most common comment, particularly from the Mississippi stakeholders, was that it helped them learn more about research-based strategies for educational improvement. Most felt that it was particularly valuable that the consultants brought diverse perspectives and many felt that they learned a great deal when the consultants disagreed with each other. Some stakeholders also felt that they learned and changed their minds when the consultants gave advice and information that was different from what they initially had in mind. Most of the consultants also felt that they learned a great deal from the convening process. The previous section of this evaluation report also indicated that the recommendations from the convening process reports were incorporated into the School Accreditation Task Force and Teacher Certification Commission reports. Compared to the previous use of the convening process with the District of Columbia Public Schools, the Mississippi educators gained most in their conceptual use of knowledge to provide general direction to their implementation plans. The D.C. educators used their more specific consultant recommendations to make policy decisions about how to reassess and regulate student promotions.

A Natural Experiment

From an evaluation standpoint, the simultaneous use of this process with two different groups with similar people and issues was ideal. It was similarly fortuitous that one group adhered to the initial convening process model more strictly than the other group. The leader of the School Accreditation group appeared more directive and the consultants, following the convening process model, met separately for a while to develop a consultants' report. In the Teacher Certification group the consultants and the Mississippi stakeholders worked together and developed the recommendations jointly. There even appears to be agreement among participants in both groups that the School Accreditation Task Force group, which adhered to the convening model most closely, was more successful than the Teacher Certification Commission group. Some said that the School Accreditation group was more advanced in their thinking to begin with and thus, more ready to benefit from the additional insights from the consultants. Both the consultants and the Mississippi participants felt that the School Accreditation group accomplished more and they felt more satisfied with the experience. It is also interesting to note that the recommendations that were adopted from this School Accreditation group seemed to differ more from what the Mississippi participants initially thought they wanted.

Dos and Do nots in Replicating a Convening Process

More is involved in operating a successful convening process than just getting a good group of consultants together with practitioners who are addressing a particular issue. It appears that it is important that the convening process adhere to the basic model described by Dr. Gold (1983) and used by the Mississippi School Accreditation Group and the D.C. Public Schools for maximum success. The convening process procedure works most effectively where the policy problem is clearly delineated and somewhat narrow as it was in D.C., but it can also be used primarily as an educational experience with people involved in very large scale complicated challenges such as implementing the Mississippi Education Reform Act.

Based on insights from this Mississippi experience and the previous convening process evaluation of its use in the District of Columbia Public Schools, it appears that future convening process planners should:

1. Obtain a mix of well respected consultants with research and practice based expertise and if possible, with diverse views. NIE was in a good position to do this as its staff are familiar with a wide range of national experts. However some other external groups, such as associations would have similar contacts. Also, an external group may not be essential if the stakeholder or client group can obtain other expert participants on its own. Consultants from outside the client system are essential as they have a certain type of credibility and lack of political entanglement with the client stakeholders that is likely to be missing with "internal" consultants.
2. Help the consultants understand the political context of the stakeholders and roles the various stakeholders have played to date and are expected to play in the future, prior to the convening meeting.
3. Involve the stakeholder clients in the definition of the problem, in developing questions to ask the consultants, and in identifying alternative solutions.
4. Insure that the consultants have sufficient opportunity to meet together to come to some consensus agreement on recommendations for the stakeholder, without the stakeholders present, and to develop a written report which will be discussed with the stakeholders at the convening meeting and, if necessary, revised based on these dicussions.
5. Give the stakeholders an opportunity to discuss the report with the consultants in a face-to-face meeting.
6. Make sure that all participants have a good understanding of the convening process intentions, procedures, and the anticipated outcomes. The host organization should make sure that the meeting agenda reflects consensus agreement on the short and long term expectations.

7. Pay attention to the role of the host organization and its relation to the other stakeholders. In some cases it may be necessary to involve some representatives of these other stakeholders directly in planning the convening process.
8. Have a strong, clear assignment of leadership responsibilities and have back-up plans if the assigned leader is not sufficiently directive to make the group stick to the convening process as designed. If two groups are meeting simultaneously, don't have one overall leader try to service both. Instead, establish co-leaders.
9. Maintain opportunities for social interaction of all participants, e.g., at meals or parties.
10. Maintain the face-to-face intensive group contact. It is unlikely that a teleconference would work unless the task was quite small and well defined or unless the participants had already had a chance to know each other as in a possible "follow-up" mini convening session.
11. Maintain follow-up interactions among stakeholders and the consultants as needed.
12. Continue to evaluate the Convening Process and its results so that this promising evaluation strategy can be refined.

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Appendix B
CONSULTANTS FOR NOVEMBER 1983 MEETING

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Appendix C

AGENDA

Convening Process on Education Reform
In Mississippi

November 29-30, 1983

Sheraton Regency Convention Center

Jackson, Mississippi

NOVEMBER 28

7:00 p.m. INTRODUCTIONS (Sheraton Room)

Participants:
All Participants (37)

Activities:
Social Hour, Introductions

Goal:
To introduce all participants

Leaders:
Norman Gold, Ralph Brewer

8:00 p.m. ORIENTATION SESSION (Regency Room)

Participants:
Consultants, NIE Staff, Key Mississippi
SDE Staff, Chairpersons of Task Force
and Commission (22)

Activities:
Planning Session

Goal:
To reach consensus regarding group goals
and procedures for the convening process

Leaders:
Norman Gold, Ralph Brewer

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OVEMBER 29

8:30 a.m. ON-SITE REVIEW (Sheraton Room)

Participants:
Consultants, NIE Staff, Mississippi SDE Staff, Steering Committees of Task Force and Commission, Representative of Commission on School Accreditation, Other Invited Guests (37)

Activities:
Updating information from Task Force and Commission; reviewing issues; identifying issues common to accreditation and certification; identifying specific issues in order of priority; matching participants with issues

Goal:
To assign specific responsibilities to appropriate participants

Leaders:
Norman Gold, Ralph Brewer

11:45 a.m. LUNCH

1:00 p.m. ON-SITE CONVENING SESSION (Regency Room)

Participants:
Consultants, NIE Staff, Key Mississippi SDE Staff, Chairpersons of Task Force and Commission (22)

Activities:
Discussing common issues (entire group); breaking into two separate groups to address the areas of accreditation and certification, with individual consultants leading discussions of their assigned issues

Goal:
To evaluate alternative strategies for dealing with issues

Leaders:
Consultants

NOVEMBER 29 (continued)

4:30 p.m. DINNER

7:30 p.m. ON-SITE CONVENING SESSION (Regency Roo

Participants:
Consultants, NIE Staff, Key Mississippi SDE Staff, Chairpersons of Task Force and Commission (22)

Activities:
Discussing common issues, reporting progress on specific issues, giving and receiving feedback, synthesizing the work of sub-groups

Goal:
To select the best strategies for dealing with issues

Leaders:
Norman Gold, Ralph Brewer

NOVEMBER 30

8:30 a.m. ON-SITE CONVENING SESSION (Sheraton Ro Resource) (Regency Roo Typists)

Participants:
Consultants, NIE Staff, Mississippi SDE Staff, Steering Committees of Task Force and Commission, Other Invited Guests (37)

Activities:
Consultants work individually (in rooms) to formulate recommendations, utilizing resource people as needed

Goal:
To produce a set of recommendations regarding the development of accreditation and certification systems in Mississippi

Leaders:
Consultants, Norman Gold, Ralph Brewer

11:45 a.m. LUNCH

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A for Convening Process
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MBER 30 (continued)

:00 p.m. REPORT OF RECOMMENDATIONS (Sheraton Room)

Participants:
Consultants, NIE Staff, Mississippi SDE Staff, Steering Committees of Task Force and Commission, Representative of Commission on School Accreditation, Other Invited Guests (37)

Activities:
Summarizing the issues and problems addressed during the convening process, presenting and explaining recommendations, receiving feedback, interacting

Goal:
To offer recommendations for developing and implementing accreditation and certification reforms in Mississippi

Leaders:
Consultants, Norman Gold, Ralph Brewer

Flexible, depending upon completion of reports

Page 33B

PARTICIPANTS IN THE MISSISSIPPI CONVENING PROCESS

NIE

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*Susan Klein
*Joe Vaughan

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Steering Committee Performance-Based School Assessment Task Force

*Olon Ray, Chairperson
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Mayo Wilson, Regulatory Functions
Annette Luther, Teacher/Staff Behavior
Estus Smith, Staff Development

Steering Committee, Commission on Teacher and Administrator Education, Certification, and Development

*Lisso Simmons, Chairperson
George Cannon, Certification & Recertification
W. O. Benjamin, Evaluation, Inservice, Follow-Up
Ira Dorsett, Teacher Education Programs
Evelyn Culiff, Provisional Certification

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*Jack Gunn, Deputy Director, Division of Instruction
*Brenda Hankins, Staff Consultant, Certification
*Jane Woodruff, Staff Consultant, Accreditation
*Jim Hancock, Supervisor of Teacher Certification
Jerry Hutchinson, Coordinator of Planning and Evaluation (Personnel Evaluation)
John Ethridge, Staff Consultant, Accreditation
Yvonne Dyson, Supervisor of Elementary Accreditation
Melvin Waters, Supervisor of Secondary Accreditation

Commission on School Accreditation

Dorothy Smith, Chairperson

Invited Observers

Tom Wacaster, Hardin Foundation
Sherman Peterson, Arkansas SDE

Some planning and synthesizing sessions have been limited to key participants. Other participants are invited into the room during these times as observers only.

TOTAL PARTICIPANTS: 37

* KEY PARTICIPANTS, TOTAL: 22

X Did not attend

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Appendix D

Name———— Date———

TELEPHONE INTERVIEW QUESTIONS FOR CONSULTANTS

1. What did you think you did that was of greatest value to Miss?

2. What was the most difficult part of this task for you?

3. How would you improve the convening process procedures?

   interaction with other consultants

   interaction with Miss. participants

   interaction with Norm or suggestion for his group leader role

   other

4. Did you feel that this group process had advantages over the use of individual consultants or other options? Explain

5. What would you most like to know about the effect of your Miss. work on Miss.?

6. What was of most value to you?

7. Other comments on this convening process.

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